South West Regional Study

Seafish Report No. 425

July 1993

Sea Fish Industry Authority

Seafish Technology

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Contents

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Summary

This report provides an overview of the fishing industry in Devon and Cornwall in early 1993. Official (MAFF) statistics are quoted which refer to their latest published at the time of preparation plus more recent figures from Sea Fisheries Committees.

The trade situation rather like that of other peripheral regions is dominated by direct export of unprocessed fish and shellfish. Although the value of landings is high at places like Newlyn, Brixham and Salcombe weights are relatively low reflecting the high value of local fish species. Nevertheless the seasonality of some low volume species landings allied to quota restrictions does not encourage the setting up of local processing. The only high volume species are the pelagic stocks. The mackerel box restrictions effectively rule out any expansion of processing in the SW. At the same time an industrial fishery for other pelagic species must inevitably take its toll in discarded mackerel. The recommendation is made for a fresh look at the box restriction to allow protection for hand lining interests but also to permit a limited trawler fishery. Allied development in processing should be supported by adequate training. Newlyn desperately needs further berthage and slipway facilities. There is a case for the provision of a safe harbour on the North Coast of Cornwall accessible at least across a broad tidal window. Finally the establishment of the Cornwall Fisheries Management Group is seen as a useful step in establishing a direct link with Brussels to provide a voice in European decision making.

1. Introduction

Regional studies are carried out for each significant fishery region in the UK. These "regions" of necessity do not necessarily coincide with County boundaries or MAFF fishery "areas". Statistics used are the latest official statistics from MAFF updated generally from Sea Fisheries Committees reports in respect of the inshore activity.

Comment on controversial issues are based on observations by experienced observers with a view to stimulating wide ranging discussion and do not necessarily reflect official Authority policy.

Finally, this report could not have been prepared without the advice and comment of a wide range of people representing the SW fishery, shore based and seagoing and including the various official administrative bodies involved. They are too numerous to mention but all are thanked for giving of their valuable time.

2. Background (1991)

This report is written on the basis of the latest MAFF provisional statistics of fish landing for 1991 and comparisons are made with the findings of a consultants report of 1987. First sale value of fish landed in Devon and Cornwall is about £43m from some 37,000 tonnes. Employing some 4,500 people of which 2,700 are sea going and 1,800 shored based. Using the consultant's multiplier would indicate an estimated total of 6300 directly and indirectly associated with the industry. Added value in 1987 was estimated at about 36% of landed value equivalent to about £16m in 1991.

Devon and Cornwall landings represent 28% of landed value in England and Wales and 24% of weight landed.

Some 90% of fish is exported from the region to other parts of the UK and direct to the Continent.

Employment in the industry is concentrated in and around centres such as Newlyn, Brixham and Looe thus making these places with smaller ports such as Polperro and Padstow very dependent upon fishing for the maintenance of employment.

Newlyn, Grimsby and Hull landed similar values of fish in 1991, some £17m. Lowestoft's landings were valued at about £14.5m. Although Brixham and Plymouth landed similar tonnages to Newlyn in 1991 the respective values were lower at £12m in Brixham and less than £4m in Plymouth where the catch was dominated by pelagic species. Newlyn landed the greatest value of fish from UK vessels in England and Wales.

A significant change between 1987 and 1991 has been a further fall in the landings of pelagic fish viz mackerel, horse mackerel and pilchard particularly at Falmouth. Falmouth experienced landings of 9,000 tonnes of pelagics in '87 as opposed to only 261 tonnes in 1991. It is worth noting that the 1987 report comments on the significant drop in mackerel landings during the 1980's, these have continued to decrease as a direct result of the introduction of the mackerel "box". Newlyn landings decreased from 900 tonnes to 300 tonnes over these years. Plymouth's share however remains fairly steady at 7,000 tonnes. Brixham shellfish "weight landed" virtually doubled and the value increased proportionately. This was mainly due to an increase in king scallop landings, including a seasonal effort by beam trawlers.

3. Ports and Harbours

The easternmost harbour of any size is **Brixham** The centre of the Devon fishery and until recently the home of Brixham and Torbay Fish (BTF). This company dominated the market East of Newlyn and brought in fish from all parts of Cornwall and Devon, and indeed from landings by Brixham vessels as far away as Aberdeen.

However, since this company collapsed a major buying force has gone from Brixham market. There are now three agencies viz Brixham Trawler Agents (BTA) handling the management of most of the fleet, Brixham Fish Marketing and Fish Auctions, Brixham. Some 50 buyers are licensed to buy on the market. The majority are small one man businesses or van salesmen. BTA are not fish buyers as BTF were. They have, however, invested in a new ice plant and in parallel with local Government investment in the new quays and extended market hall, the resultant facilities are excellent. The approaches to the fish quays are, however, still unacceptably congested particularly during the summer holiday season. Also due to space constraints the removal of fish from the market can only be achieved through the end of the market hall as there are quay aprons on both sides.

The local 'day boats' have had a good season landing mullet and squid somewhat offsetting lack of landings by local beam trawlers in 1992 and early 1993 landings look to a repetition of this trend though there have been fewer landings away from Brixham this year.

Plans for a new road along the shore limits of the harbour towards Freshwater Bay have unfortunately never been realised.

Torbay Council are presently trying to obtain assisted area status particularly due to a reduction in tourist income and the general recession including a fall in harbour revenue due to local vessels landing in other parts of the UK. The Council have reduced wharfage charges on overlanded fish in an attempt to attract more of the fish landed by Brixham boats on the East coast, back to Brixham market.

Plymouth

Sutton Harbour Company (SHC) have embarked on an ambitious plan to create a dock with a locked in depth of water capable of allowing large fishing vessels to float at all times. South West Water are assisting the funding of a lock at the entrance to the harbour as part of flood defence works. SHC have obtained City Grant support to build new quays and a fishmarket hall on the Coxside harbour frontage. Construction work on the lock and adjacent quay has commenced.

The old Barbican fish market will cease to operate when the new hall is opened.

The local fleet has been considerably strengthened by the introduction of two beam trawlers by the locally based company Interfish. These vessels are also rigged to trawl, specifically midwater trawling for mackerel.

Official statistics for Plymouth's "fleet" are distorted by the inclusion of at least fifteen trawlers owned by Spanish interests being registered in Plymouth. These vessels rarely if ever visit the port.

Plymouth's strength lies in its excellent motorway links to the rest of the UK and the location of local ferry services to Britanny and Spain. It will become particularly attractive to larger vessels, in particular those fishing pelagic stocks when the new dock is completed. Presently a limited number of Scottish trawlers use ABP's Millbay dock basin but this is scheduled in the long term for further ferry and related development.

Exmouth

Development interests presented plans for a marina type village and associated moorings which were to transform the commercial dock. Fishermen were granted the continued use of the dock entrance quays that they presently utilise. Seafish assisted the local association in approaching the local planners to retain this facility.

The dock was subsequently closed to commercial shipping without a Parliamentary Bill going through as it was claimed that the quays within the basin were structurally unsafe.

Following the downturn in the property development market no further work has been carried out. Meanwhile the fishermen carry on much as before.

There is a small fleet of potting boats, some utilising moorings in the mouth of the Exe.

A recent development was the use of suction dredging to harvest mussels near the dock entrance.

Teignmouth

This is principally a commercial dock used by only three or four small trawlers. Substantial landings of sprats have been made at both Exmouth and Teignmouth on an occasional basis in the past. There are two local plants which accept these fish for pickling and barrelling for the Scandinavian market. Teignmouth has become the port of registry for several new "super crabbers" introduced recently.

Kingswear and Salcombe

Kingswear on the Dart and Salcombe harbour on the Kingsbury Estuary are the main centres of the South Devon brown crab fishery with landings of 733 tonnes and 391 tonnes respectively in 1991 (MAFF provisional). Values were £751,000 and £383,000 respectively. South Devon shellfishermen have recently claimed that crab prices in the area have been adversely affected by the operation of super crabbers in the North Sea landing large quantities into Grimsby. These boats are of course owned and crewed by South Devon men.

Mevagissey

A traditional Cornish inshore fleet base with a considerable fishery for mackerel (handline) seasonally. Previously it was the base for a fleet of long line boats, however, the owners of these have now changed over to fishing bottom set gill nets for hake, cod and pollack. One of the more adventurous developments recently has been the venture into drift netting for tuna carried out by a local netter. Several other West Cornwall boats have joined this fishery.

Looe
The marketing position of Looe was weakened in 1992 by the winding up of Looe Fish 1988 Limited. The final demise of the company was due to cash flow problems associated with delayed payments by inland clients. This problem was frequently identified throughout the South West.

The Government has addressed this general problem within the last twelve months by legislation on payment procedures with particular reference to small businesses but apparently with little effect. An impressive modern market hall was built in the 1980's. Looe is the base for one of the most dedicated and professional groups of fishermen in the Region, but the fleet has been constrained from developing into larger vessels by depth restrictions in the harbour. The latest reports from Looe indicate the resurgence of a strong local market there.

Falmouth
Falmouth 's fortunes have been closely related to the offshore mackerel fishery. Official (preliminary) MAFF statistics for 1991 include landings in the Helford river but exclude the other small landing places such as Flushing in the Carrick estuary. About £2m value of fish and shellfish are recorded for 1991. Of this only £52,000 was of pelagic species.

In contrast, in 1984 some £2m of pelagic species, mainly mackerel landings are recorded for 1987 £0.9m. This is of course a reflection of the effect of the mackerel box restrictions.The huge natural sheltered anchorage of Carrick Roads allowed, a major transhipment operation to mainly Eastern Bloc factory ships to take place in the early 80's. There are excellent ship repair facilities and deep water quays at Falmouth docks. There is an underutilised ice plant; the owners Falfish buy fish on Newlyn market.

The Helford River and the Carrick Estuary (Falmouth) provide moorings for netters and potters as does Porthleven in Mounts Bay and Mousehole. Small boats operate from the beaches at Lamorna, Penberth and Sennen coves hand lining for mackerel, also seasonally from St. Ives. Similarly boats work pots and lines from beach landings in the Lizard such as Cadgwith and Coverack. Fish from all these West Cornwall landings is dispatched daily to Newlyn. Some shellfish is, however, loaded directly on to vivier transport or is sold to processors other than in Newlyn.

Padstow
A new ice plant has been built at Padstow by Camel Fish. Bideford Fish have an interest in this development and obtain regular supplies to augment their own plant's production. The availability of ice has attracted several additional visiting vessels, however, there is a problem in utilising the main basin which drys out. During last winter, however, the small yacht basin was utilised, and as many as 20 beam trawlers were able to shelter there. These vessels were able to remain afloat in this "locked in basin" which was built a few years ago to provide summer yacht moorings but is practically empty during the winter months. These beam trawlers are, therefore, able to run their refrigeration compressors which rely on seawater intakes. This is, of course, not possible in the main tidal harbour. Padstow is the closest port to the rich Trevose fishing grounds where a large seasonal fishery for soles is carried out mainly by Belgian beam trawlers.

Cornish Fishermen Limited which is no longer active has been replaced by Trevose Fish run by the former CFL manager. However very little shellfish is now handled. Virtually all shellfish is purchased by Jose, for Brixspan, Spanish vivier transport. Padstow remains a prime site for dock development to serve the large seasonal fleet of Belgian and UK vessels trawling the Trevose grounds.

Newquay, Hayle and St. Ives

A number of developments planned for Newquay and Hayle have been put off owing to the depressed property market upon which both harbour developments depended. One positive development at Hayle has been the utilisation of a redundant building for live shellfish tankage. The provision of these facilities was one of a number of recommendations for local development made by Seafish in an earlier study/ There is a small fleet of potters/netters based here.

Newquay presently hosts a fleet of about 20 crabber/netters with a couple of larger local boats using Padstow.

St. Ives hosts visiting handline boats from West Cornwall seasonally, but the harbour is tidal and very exposed to the North East. There are some 40 small boats, however, skippers from St. Ives own larger boats which now use Newlyn.

Port Isaac

Port Isaac supports a small fleet of crabbers operating out of a tidal harbour and landing across a beach. The fleet consists mainly of fast semi planning craft. The local fishermen's association lease facilities known as the cellars underneath a listed building for bait stores, gear and fuel stores. There are also two privately owned fish shops.

These premises will require upgrading to meet food hygiene regulations and advice was provided by Seafish as to the procedures to adopt.

Bideford and Ilfracombe

Bideford fishermen are also considering forming a co-operative to lease premises that are to be provided by the Council as fish and bait holding premises, recommended in a Seafish/Civil Engineers study. Municipal development in the form of a car park has overtaken the original plans, however, and a new riverside site is being sought. A similar holding store for fish landings was proposed for Ilfracombe in the same study. North Devon Council had allocated money within their budget to provide such facilities.

Bideford with Appledore is the base for a small fleet of trawlers with their principal catch being skate in the Bristol Channel.

The main problem presently being faced by North Devon fishermen is that of pollution in the form of considerable quantities of solid rubbish taken in trawls. Much of this is apparently shredded plastic and the suspicion is that this material comes from a refuse site and instead of being buried is being dumped offshore. This problem should be addressed at Council level because so far, fishermens' representations have met with little success.

The winter activity of at least one Bideford fisherman is now likely to have to cease. The estuary of the Torridge has been classified as 'D' under the new mollusc hygiene regulations. There is no local possibility of relaying these mussels in sheltered waters.

All the North Cornwall landing places and indeed those in Devon to the Somerset border dry out across low water thus limiting their importance as fishing harbours but still providing some £2.9m worth of landings predominately of demersal fish but including about £0.7m worth of shellfish.

Padstow landings account for £1.4m, St. Ives and Hayle £0.5m and Port Isacc £0.4m. The latter includes £0.13m for crab and £0.22m for lobster.

Newlyn

Newlyn remains the principal fishery centre of the two counties. There has been considerable investment in the local fleet over recent years, although not all of it has been in new vessels, there is a significant fleet of beam trawlers all locally owned, mainly through the Stevenson office.

A company owned by fishermen has recently invested in a new ice plant after receiving a Government grant. The existing ice supply had been found inadequate for peak demand.

The fleet of netters has also built up, some of these vessels are former trawlers. This fleet has recently found local fishing poor and vessels have ventured as far as 200 miles seeking better catches. Landings have been made in harbours in Southern Ireland and also in Brittany where skippers have reported back favourably as to prices and service facilities.
Clearly buyers in Newlyn are unhappy about this development (see also remarks in respect of Brixham).

Ambitious plans for dock development were produced recently. These acknowledge the strategic position of the port and also the lack of land adjacent to the harbour for processors and storage. Additional slipways are also allowed for. In the present national economic climate it remains to be seen whether sufficient grant support could be obtained to produce a viable development project. Any continuation of the trend for vessels to land elsewhere will of course affect the port's revenue, and investment plans.

Newlyn has one of the UK's most modern fish auction halls, capable of meeting new hygiene regulations with the minimum of expenditure. Road access is however still problematical. Fish is delivered to the market from the larger trawlers by trucks which park on the main through road. Simultaneously fish is trucked away from the landing apron of the market.

The eventual solution must be to either substantially alter the town's through traffic system which would appear to be very costly in view of the topography, or to build a new market possibly on the new pier where the existing car and lorry park stands. The present market could presumably be easily converted to accommodate fish processors. There is insufficient water alongside the market to allow access at all states of the tide. Due to the size of the local fleet there are only a limited number of other berths where beamers can land.

In parallel with this study, a detailed survey of market activity and practises was carried out, with a view to offering an outsider's view, and hopefully helpful suggestions for improvements, should problems be highlighted.

4. Area VII Stocks and Quotas

The Cornish Fish Producer Organisation based in Newlyn represents the owners of several different classes of vessels with perhaps different priorities. On the one hand the small cove boats are dependant for their income on local stocks particularly mackerel and on the other hand netters and trawlers are hunting relatively high value demersal stocks. The PO is active on the Area VII management group together with other PO's. At this forum the fishery from the Straits of Dover to the South Western Approaches through to the Irish Sea and North Antrim in Northern Ireland is discussed. Quota allocation of pressure stocks is decided in discussion with MAFF officials. The Plymouth based South West PO represents fishermen in the Devon and Dorset areas. PO membership is not 100% and non sector quota allocations are available.

These discussions are held against a background of historical competition particularly with French and Belgian fisheries and, of course, the demands of the so called 'flag of convenience' fleet owned by Spanish interests. This latter situation is, of course, an absurdity in terms of national fish allocations. The only light at the end of this particular tunnel is perhaps reference in the review by the European Parliament of the Commission's monitoring of Community Law, "to what extent, subject to compliance with the Treaty and given the underlying principles and specific features of the CFP a relationship must exist between a fishing vessel and the Member State whose flag it flies and whose quota it fishes"![1].

One arrangement that has been entered into to allows part of the UK's area IV (North Sea) plaice quota to be passed to the Netherlands in exchange for the Netherland's sole quota in area VII. Without this agreement the UK would not have a SW sole fishery off our own shores! The UK entered into the beam trawl fishery comparatively recently and this is unfortunately reflected in our share of flat fish catches. Similarly the inshore vessels of Cornwall which with larger drifters used to supply local canneries with pilchards no longer prosecute this fishery, not due to lack of fishery opportunities but due to lack of market outlets. That fleet or the new vessels owned by those fishermen have had to seek new fisheries at a time when fish quotas were being alloced on a Community basis.

In the late seventies dispossessed Humberside freezer trawlers driven from their Arctic grounds and Scottish vessels denied a herring fishery descended on the SW mackerel stock.

Local inshore fishermen saw their last big opportunity, handlining for mackerel being heavily fished by 'strangers' and eventually political pressure allied to genuine concern for stocks brought in the mackerel box closing the SW area to large vessels seeking to trawl for mackerel. MAFF biological sampling indicated a preponderance of young fish and the obvious abuse of the quota system by Scottish vessels transhipping to factory ships, supported calls for mackerel fishery restriction. Meanwhile a fishery by foreign, mainly Danish trawlers for other pelagic species for reduction to fish meal continues within the area. There is no doubt that this fishery causes considerable mortalities to the mackerel stock not least through inevitable discards. It is perhaps time for a fresh look at the conservation of SW mackerel.

[1]Reference Annual Report to the European Parliament 1991 (92/C250/1Com 92 136 Final

Area VII committee deliberations therefore represent an uphill struggle to retain viable quotas against the results of decisions made on historical rights during a period of unprecedented upheaval in the 1980's. Table 2 illustrates 1991 and 1992 quotas with 1991 uptake.

Since preparation of this document 1992 quota uptake and 1993 quotas have become available. These show some significant changes in the present availability of quotas to UK vessels since 1992. (See Appendix 1).

These include for example a reduction of 19% for cod, in Area VIIA with a small 4% increase in the Channel and South West. A reduction of 24% for whiting in VIIA and 4% in the rest of VII. Various reduced quotas apply to plaice with -29% in VIIA and 66% in the most westerly areas of H, J and K. Sole is down by 56% and 44% in the South West approaches although there is an increase of 12% in the Western Channel. Megrims increase by 23% but anglers are down by 45%. It is immediately obvious that these changes will have a major detrimental effect on the earning potential of boats fishing the Western Channel, Western approaches and the Irish Sea.

Of interest to some boats in the West Country is an increase in the Western mackerel stock quota of 10%.

5. The Fishing Fleet

The latest MAFF statistics relate to the fleet of vessels of over 10m in length as at 31st December 1989. A total of 365 vessels, 190 in Cornwall and 175 in Devon. Tables 3 and 4 include this data as well as Sea Fisheries Committee data and show concentrations of vessels at Newlyn 98, Brixham 84 and Plymouth 41 vessels respectively. There are fleets of 18 at Looe, 14 at Newquay, 13 at Kingswear, 13 at Falmouth and 13 at Padstow. Another 71 vessels are recorded at another 21 harbours in Devon and Cornwall including 7 boats in the Scillies.

A further study of the statistics on vessels between 10m and 24.3m (nearly all of the larger boats) shows that some 46% are vessels of over 25 years and over 60% are vessels of over 20 years of age. This is fairly typical of the fleet in England and Wales. The extremes are North West England, 90% and Redcar to Cleethorpes only 47%.

The age profile may, of course, show a steep upward curve within the next five years in the absence of grants for new building, the restriction on transferability of licences and a general reduction in profitability. There is a real problem building up on a nationwide basis particularly as secondhand Scottish vessels are unlikely to be available as they were in the past for the very same reasons. A vicious circle of increased maintenance costs allied to further reduction in fishing opportunities could cause large numbers of boats to cease operation.

Statistics from Sea Fisheries Committees list the much larger fleet of boats of less than 10m length. A total fleet of 789 boats is recorded. These statistics are also more recent, and show concentrations at Mevagissey 63, Looe 42 and St. Ives 43 in Cornwall and in Devon at Brixham 62, Plymouth 40, Dartmouth 39, and Exmouth 38.[2] The figures include only commercial fishing boats some of which fish part time or seasonally only. A total of 67 landing places are named. Thus the balance a total of 462 boats boats are distributed across 60 landing places.

A larger proportion of the inshore fleet, boats of less than 10m are outwith the ageing sector. Many of these vessels were built in the 80's at lengths of less than 10m in order to avoid individual boat catch restrictions, and also Department of Transport safety requirements. Detailed age statistics are unavailable for this sector.

Both the loopholes are shortly to be filled, however, with compulsory licensing of all fishing vessels and the enforcement of the safety at sea requirements down to boats of 7m and over.

[2] Cornwall statistics list 166 boats as seasonal and 236 as part time, out of the total fleet of 428 of under 10m boats

6. Fish Merchandising and Processing

Most of the activity in this sector in the South West involves buying and repacking for onward transport. The once important Cornish pilchard canning industry finally ceased in 1988 with the closure of Shippams at Newlyn.

Important firms in the South West:

Channel Foods	*at Truro*	They are forced to buy in much of their raw material viz mackerel from Scotland
British Cured Pilchards	*at Newlyn*	Press and pack salted pilchards for the Italian market, but take only a fraction of the landings of the 50's and 60's
Harveys **Browse Bros**	*at Newlyn* *at Paignton*	Are the principal shellfish merchants/processors. One firm at Indian Queens and another at Plymouth closed during the last year. There is, of course, considerable competition from vivier transport serving the Spanish market for landings of crab and lobster, crays etc.
Interfish	*at Plymouth*	Fillet, pack and freeze mackerel mainly from freezer trawlers, suffers from lack of supplies in the almost complete absence of local trawling activity for mackerel. This company has invested some £7m in modern equipment in recent years.
Stevensons	*at Newlyn*	Are the principal buyers of demersal fish followed by
Nick Howell	*at Newlyn*	Buyers of demersal fish.
Suttons	*at Newlyn*	Handle much of the local mackerel catch for onward marketing.

Scottish trawlers land pilchard and horse mackerel at Plymouth, but a lack of suitable public cold storage in the region has meant that pilchard is trucked to Scotland for cleaning and freezing and subsequently transported South again for conversion to paste in Liverpool or Chichester. These vessels also land mackerel reportedly taken outside the limits of the "box".

The short sea crossings from Dover are used by fish transporters trucking into France, Germany, and Italy whilst much of the fish for France and Spain either goes direct by ferry from Plymouth via Roscoff in Brittany.

The development of added value processing in the South West was one of the aims of the Devon and Cornwall Development Company. However, in the absence of a continuity of supply in volume, the attractions of this type of development are dimmed by the cost implications of having to bring in fish from other areas to supplement local landings.

Only mackerel and perhaps pilchard could concievably provide volume supply, at least seasonally.

Table 5 is an indicative list of businesses in the South West with their specialisation. Though not conclusive the greater majority of firms are included.

7. The South West, A Discussion

7.1 General

The Devon and Cornwall Fisheries Development Group report by Coopers and Lybrand on 12th April 1989 concludes with the presentation of a regional development programme. There was a proposal to set up a regional support group to oversee specific development proposals. The concept has not been taken up but events have moved on and perhaps most significantly the influence of Brussels and the European Community is the dominant factor in 1992. Not least because the free market concept with all its attendant rules and regulations aimed at standardising measurement of quality and quantity across the board, came into being on the first of January 1993. The effect of this has been to concentrate the minds of business and local administration alike. Investment into bringing businesses "up to standard" is either being actively considered or has been already implemented. To some extent the financial requirements of this legislation has inhibited new development. Older more traditional firms are in many cases being forced into the 21st century. It is to be hoped that interpretation of the new hygiene rules for example will be pragmatic rather than extremist, aided not least by the production of industry guidelines by the Sea Fish Industry Authority. Perhaps of more long term importance however is the acknowledgement by Regional Authorities of the meaning of "subsidiarity" and the importance of the "regional approach" rather than the National or even County approach to Brussels.

A recent initiative which is to be applauded is the formation of a Regional Fisheries Management Committee. Chaired by the Cornish PO and sponsored by Cornwall County Council's CEDO or Cornwall Economic Development Office. Liaison with Devon is being encouraged and support for the concept has been forthcoming from DCC. Devon and Cornwall belong to the conceptual group of areas known as the Atlantic arc stretching from the Shetlands to Portugal. These regions are relatively poor in comparison with their industrial neighbours to the East, but their one common denominator is their access to a renewable wild food source, fish.

Unlike our near continental neighbours however, fishing has never been regarded in our peripheral regions as other than a cottage industry carried on by traditional families, providing employment in small communities and at best a tourist attraction. Only very recently have some Councils considered fishing within structural plans! The boom times of the 80's provided both threats and opportunities to fishing communities. Threats in terms of changes of harbour use and opportunities in terms of a spin-off from profits made from alternative usages by harbour companies. The recession has halted these trends, the change having been exacerbated by tightening of UK Government infrastructure funding. Plans for Padstow, Hayle and Newlyn lie in abeyance.

Meanwhile the industry sees itself as in a crisis situation with pressures to curtail fishing effort, and of particular local significance, the imposition of controls on the hitherto free for all for boats of under 10m length.

Trawlers are specifically targeted for fleet reductions of 10 to 20% within the EC multi annual guidance programme.

The United Kingdom Government has brought in legislation to curtail the number of days fishing per boat per annum.

There was concern recently over talk of adjustment to the Common Fisheries Policy despite assurances quite recently that the mid term review of the CFP would more or less allow maintenance of the status quo until 2002. It has since transpired that these fears have been largely unfounded, although Spain is still pressing within the European Parliament to gain earlier access to North Sea Fisheries.

The decision of the European Court that flag of convenience vessels were entitled to fish UK quotas was a bitter blow even if not entirely unexpected, it makes a complete mockery of national quotas allocations. Locally Cornish and South West PO quotas were adversely affected, particularly the hake quota. Almost inevitably UK fishermen complain of the rigid enforcement of EC regulations by UK authorities and claim that the Continentals adopt a more relaxed attitude. Unfortunately most of the fish are within the UK parts of the EC 'pond'

Equally MAFF are seen as unsympathetic at best and downright disinterested at worst at the fate of the fishing industry, they are perceived as an EC regulatory body.

A combination of these attitudes contributes to the defensive posture being taken, for example, by Cornish small boat fishermen against even a limited trawl fishery by their own regional boats on mackerel. Meanwhile local processors employing significant numbers of staff are frustrated by lack of supplies. There are deep divisions between neighbouring fishermen. The Devon crabbers who have invested in larger so called super crabbers are accused by their colleagues fishing the Channel of undermining the market by landing 'bulk' of lower quality in Grimsby. Mini beamers, built to take prime fish and yet beat the imposition of restrictive legislation come into conflict with static gear fishermen in inshore waters. Meanwhile French stern trawlers tow through Cornishmens' static gear off the Scillies.

The industry is liable to tear itself apart publicly at a time when it should be fighting to maintain its position regionally and within the EC.

The establishment of the Cornish Regional fisheries management committee is surely a step in the right direction. The question must be asked however in the absence of positive 'leadership' from the Ministry is there a national body which can arbitrate in fishery matters? Other industry's have ombudsmen, councils etc usually activated by major national problems of one kind or another. Is there not a case for something of this nature for fisheries. It does seem as though producers of wool from hill grazing or of milk have their problems addressed often by way of compensation by the same Ministry that adopts a totally different attitude to fisheries. The cynics point to the relatively small contribution of fishing to the national economy but Government and

Brussels must be reminded of the regional importance of the industry in the already disadvantaged regions, of the Arc Atlantique. Devon and Cornwall's fishing industry contributes £90m annually plus some £15m added value and employs 4,500 people, according to C & L's report.

The encouragement of adding value locally to the Devon and Cornwall landings requires the co-operation of fishermen, fish salesmen and fish buyers as well as local government. Restrictive practises from whatever source which restrain the development of markets is a matter which should be addressed urgently by the regional committee. Only the operation of a free yet fair market will allow the growth of healthy competition. There are vested interests in catching, selling and processing as in all industries, but in an underprivileged area such as the South West they must not inhibit development. The availability of development grants is of little use if the market is inhibited.

In the present situation, protectionism is natural and only a truly disinterested body can be expected to rule what is fair competition and what is unfair protectionism. If contentious issues are aimed at a body such as the management committee they may be addressed rather than ignored. The small man with a complaint real or imagined can be heard without recourse to expensive legal discussion. There is perhaps a role for the Counties in the absence of another dispassionate body. They could take professional advice from such as Seafish.

Coopers and Lybrand encouraged the development of quality standards and of 'added value' production. Seafish have been much encouraged by the positive reaction of fishermen to training material designed to improve 'care of the catch', and by training initiatives being supported by S W processors. There has been a disappointing response to proposals for more added value production. Certainly some of this has been due to uncertainty over continuity of supply due to quota stock restrictions. Several crab processors have actually closed since the last report was issued.

The development of direct vivier transport of shellfish from point of landing to Spain has not helped local processors. Nevertheless there are many examples of firms in North East Scotland and England who produce value added fish products, sourcing their supplies from all over the UK and Ireland and even abroad as well as local supplies.

Though labour is available in the West Country, necessary skills for fish processing may have to be imported. The provision of funding to train fish process workers perhaps by bringing in instructors from other areas would be a worthwhile exercise but of course the initiative would have to come from local firms.

The Devon and Cornwall Development Company is no longer active but local industry is looking towards the West Country Development Corporation to provide support for new projects. Finance from this sort of body would normally be provided on a matching basis pound per pound.

7.2 The South West, Mackerel Box

EC Council Regulation 3094/86 of 7th October 1986 confirmed the restriction on the mackerel fishery of South West England. This effectively closed UK waters within 30 to 100 miles offshore to trawling and purse seining for mackerel, accept for a limited by catch, from Lyme Regis to Fishguard. Regulation EC 3287/88 extended the area Eastwards in the Channel to a line running due south from Swanage in Dorset to the Cherbourg peninsula.

Scientific evidence was presented and accepted in light of the exceptionally heavy fishing known to have been carried out during the late 70's and early 80's by large UK vessels, mainly from North Britain.

Meanwhile a different approach was taken in Northern waters where a restriction on fishing for demersal species had been instituted under EC regulation for an area encompassing the fishery around the Orkney and Shetland Islands and extending from 12 miles to as much as 60 miles offshore.

Unlike the mackerel box, which effectively stopped mackerel fishing but for the fleet of small inshore boats, the Shetland box restricted effort on all demersal stocks by limiting the numbers of trawlers permitted to work the area and imposing an upper limit to the size of vessels. Numbers being allocated to each of the EC nations traditionally fishing there. This latter system of effort limitation in sensitive regions is favoured by the Community and it is significant that approval is included in the 1992 CFP review for the extension of this policy.

It is suggested that the principal of controlling effort rather than effectively closing a major fishery is preferable in the case of the SW mackerel stock. The knock on effects of such a "closure" are not to be underestimated. These include the possible closure of processing plants built to accept pelagic fish for human consumption or at least a significant effect on profitability by having to access fish from other more distant resources.

It is a fact that the only stock in the South West that can provide the volume which potential additional processing would require is the mackerel stock. Processors able to rely on this supply could diversify seasonally into other processing activities.

Clearly market opportunities would have to be identified as has been the case in NE Scotland, before any further investment is made into mackerel processing in the SW. However, this development will not take place until volume landings are allowed through a trawl fishery.

Also vessels denied access to a fishery will seek alternative employment elsewhere thus shifting effort rather than reducing overall fishing mortality.

Investment in harbours and services infrastructure is put at risk when the usage by large payers of dues is cut off.

Thirdly, the irony of the present situation is that non UK vessels fishing for pelagic species for reduction may still fish within the 'box' for other species of insignificant interest to the UK fleet. These vessels are in many cases as large if not larger than the Scottish purse seiners and Humberside trawlers denied access to mackerel for human consumption outlets. Even if 100% control could be exercised over fish held on board these vessels in terms of the mackerel 'by catch' one can only speculate as to the size of the discards of mackerel, killed in the process. There have been recent reports of dumping of discarded mackerel which is affecting the crab potting fishery.

On the other hand, the Shetland Box approach would permit a sustainable level of effort on pelagic stocks for both outlets by a controlled level of activity and it is suggested, that by limiting effort to trawlers of less than say 30 metres, with an allocation of vessel numbers allowing an historically based preference to vessels fishing for human consumption.

Ideally, bearing in mind the high proportion of juvenile fish present in the SW stock, the fishery should be limited to local vessels including trawlers landing to local outlets and in parallel, industrial fishing within the box should not be allowed.

It is suggested that monitoring would probably be simplified by reducing the requirement to check catches and replacing it with simply the identification of vessels.

Mesh size regulations for mackerel trawlers should be reviewed and probably mesh size should be increased. The United Kingdom Government could still impose a trawling ban within the six mile limits, but permit a controlled, licensed fishery inthe box outwith these limits.

The justifiable concern of the inshore fishermen would be allayed in terms of conservation of the stocks and their particular markets would be unlikely to be affected, whilst large processors could develop in the South West in the knowledge that volume catches would be available throughout the season.

The Shetland Box type of approach would surely produce a more acceptable situation whereby UK industry would benefit from access to mackeral for human consumption rather than a situation where, it appears the only beneficiaries are the reduction plants in Jutland and the Danish fleet.

The South West should plead its case for a modified approach to mackerel fishing restrictions taking into consideration all aspects of local industry including major local investment in ships and plant as well as the particular protection required by cove fishermen whose opportunities are limited due to the nature of their fishery.

Handline fishermen are naturally concerned as to the effect on their traditional markets should a trawl fishery resume. Local processors however claim that they could absorb the catches of locally owned pelagic trawlers without affecting the handliners' outlets.

There seems little doubt from fishermens' reports and indeed the quantities of mackerel already landed by the few "pairs" of Scottish trawlers that a modest SW trawl quota would not have any significant effect on stocks.

MAFF should be consulted in the light of the latest, as yet unpublished, stock assessment to advise on the potential for a limited fishery including a recommendation for revised mesh size regulations if deemed necessary.

8. Summary of Conclusions

In summation, the establishment of a local fishery management group is of the utmost importance . Membership should be as comprehensive as possible representing all facets of local industry. It should be supported by the two counties and should seek independent advice where arbitration is necessary. This body should liaise closely on a regular basis with the Commission in Brussels through the Cornwall Economic Development Office (CEDO).

Encouragement must be given to training in good practises for both seagoing and onshore fish workers, this will improve quality throughout the chain of boat and fishmarket transport and packing or processing. In particular support should be given to local firms wishing to enter the "added value" market provided that, particularly on the demersal fish supply front they are able to source from a range of geographical areas. The local pelagic fishery should be capable of supplying mackerel, horse mackerel and pilchards on a seasonal basis to local added value processors. There are however political and marketing problems to be resolved which are dependant on species. Some can be resolved locally or within the UK, and some need to be referred to EC through the Community's fisheries legislators.

There is still a shortage of freezing and cold storage in the West country, though this requirement is very much allied to the level of local landings of pelagic fish which are presently at an unnaturally low level. There is generally adequate berthage on the south coast particularly with the addition of new deep water quays at Plymouth. The provision of additional slipway facilities in S.W. Cornwall would relieve the problem of queuing for slips at Newlyn. Additional deepwater berthage is required at Newlyn and it is suggested that further reclamation within the harbour allied to quay works could provide this and also allow for further service or processing industries to be set up.

The development of a safe harbour on the North coast accessible at most states of the tide would be a desirable asset both from the safety and the trading point of view. The road access to West Cornwall has improved greatly since the Devon and Cornwall Development Group report. Whilst local access to Brixham and Newlyn is still unacceptable, a new link road to Plymouth's, as yet uncompleted fish quays is already planned.

Fish stock conservation policies are of course "the principal issue" regardless of all others previously discussed. As this report was being prepared the United Kingdom Governments' Sea Fish Conservation Bill became law and industry is united as never before in opposition. It is outwith the scope of this report to comment on the various measures proposed except to reiterate that technical measures related to size selective gear modifications and indeed the total prohibition of some gears in nursery grounds plus clear benefits to users of line fishing equipment should receive priority over proposals such as full fishery closures or days at sea restrictions, the latter is fraught with safety implications. The availability of fish is not constrained or controlled by artificial means, but by a variety of natural reasons such as the existance of feed-predators or other biological and seasonal variations. They ultimately have to be located and caught by the fishermen and because of these reasons this activity cannot simply be carried out in accordance to the allocation of specific days on a calendar.

United Kingdom fishermen are particularly incensed by the imposition of limits on their potential to earn a living whilst there is ample evidence of abuse of regulations, in particular by Spanish interests allied to an apparently small and ineffective landings control service in Spain.

The problem of discarding non target species is particularly relevant to the South West pelagic fishery and perhaps the only real solution is to seek a total ban on fishing for reduction purposes. Industrial fishing is of no direct benefit to the Region and as stated previously can only have a detrimental effect on the mackerel stock plus a direct effect on the crab fishery as a result of discards.

It is unlikely that there will be any substantial increase in local added value processing unless some access is allowed to local trawlers to the mackerel stock.

A limited trawl fishery by locally owned vessels should be sought through a Regional approach to the Commision and backed by up-to-date stock assessment. This should be presented as a social measure taking into consideration not only local trawling interests but also the significant shore employment in mackerel processing and indeed the possibility of development. Finally every support should be given from whatever source, local, national or Community for upgrading skills throughout the industry. Despite all that has been done to divide up the available fish stocks on a Community share out basis, some 5,000 people make a direct living out of the fish business in Devon and Cornwall. In the absence of unlimited access to stocks in "our" waters it is necessary to make the best use of what is caught by handling the catch, grading, transporting and processing to the highest standard to compete in the Single European Market.

The 1993 fish quotas for the South West and the Irish Sea show some quite alarming reductions in the allocations of the main species. These are bound to cause major profitability problems for local boats and may well exacerbate the problem of black fish landings throughout the UK.

Appendices

Appendix I

Quotas and Catches 1992 Relative to South West Fishery and 1993 Quotas with Percentage Change (Tonnes)

Species	Area	1992 Catches England and Wales	1992 UK Catches	1992 Quota	% Age Uptake	1993 Quota	Quota Change 92-93
Cod	VIIA VII Ex VIIA & VIII	1110 1470	3879 1795	3815 1790	102% 100%	3965 1450	+4% -19%
Haddock	VII & VIII	203	680	600	113%	600	No Change
Saithe	VII & VIII	548	1840	2150	86%	2150	No Change
Whiting	VIIA VII Ex VIIA	991 1651	4334 1942	4695 2470	92% 79%	3285 2360	-24% -4%
Plaice	VIIA VIID & E VIIF & G VII HJK	1184 2557 274 238	1441 2653 294 265	1895 2790 350 510	76% 95% 84% 52%	1155 2470 330 170	-29% -11% -6% -66%
Sole	VIIA VIID VIIE VIIF & G VII HJK	400 672 425 304 206	502 714 457 322 217	505 675 470 340 215	99% 106% 97% 95% 101%	220 615 530 310 120	-56% -9% +12% -9% -44%
Mackerel	VII, VIII & XII	8316	219035	230950	95%	255980	+10%
Hake	VI, Vb & VII	1594	6574	7140	92%	7190	+1%
Sprat	VIID & E	1762	1762	7140	25%	6300	-12%
Horse Mackerel	VI, VB & VII	894	9988	-	N.A.	N.A.	-
Megrim	VII	1381	2042	2210	92%	2720	+23%
Anglers	VII	2122	3834	6240	61%	3460	-45%
Pollack	VII	1542	1760	2440	72%	2440	No Change
Norway Lobster	VII	480	5797	6565	88%	6565	No Change

DEVON AND CORNWALL

Preliminary Landings Figures 1991
Table No. 1

Port or Landing	Demersal		Pelagic		Shellfish		Total	
	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value
South Coast								
Cawsand	1	553	0	0	0	0	1	553
Beer Exmouth and Sidmouth	108	130881	341	72605	84	124532	533	328018
Teignmouth - Torquay	3	5048	1074	226928	-	220	1077	231566
Brixham	4808	9009536	1726	385595	1987	2940422	8522	12.3m
Kingsbridge	3	8559	0	0	-	152	3	8711
Kingswear	14	17581	0	0	745	787238	758	804901
Salcombe	14	17960	6	3200	394	391498	414	412658
Hope Cove	0	0	0	0	11	15715	11	15715
Plymouth	1037	1952876	7265	844819	812	981292	9113	3.8m
Looe	1255	1738494	359	98229	186	326348	1800	2163071
Polperro	70	110573	48	11723	21	29095	139	151391
River Fowey	1	1990	4	1133	78	82585	99	108965
Mevagissey	442	595710	671	157753	25	35909	1179	830600
Portloe	-	-	-	-	34	38369	34	38369
St. Mawes	-	940	0	0	35	36448	35	37394
Falmouth & Helford	829	1226055	261	52291	603	688602	16932	1,966,94 8
Flushing	12	15645	48	16871	25	27529	85	60045
Penrhyn	2	2310	0	0	-	389	2	2699
Mylor	1	308	-	15	0	0	1	323
Coverack, Mullon, Cadgwith	5	5874	8	2850	211	237619	224	246073
Penzance	64	147223	0	0	10	9446	74	156669
Newlyn	7798	16152848	352	55620	802	856613	8952	17.06m
Penberth & Sennen	1	11270	57	16991	18	58778	77	87039
Scilly Isles	107	115450	-	1	111	176997	218	292448
Others	61	80844	8	3782	20	34208	89	118834
North Coast								
St. Ives & Hayle	201	320408	132	25620	72	145134	405	49162
Newquay	9	17938	0	0	0	0	9	17938
Padstow	654	1075994	-	15	220	360373	874	1.4M
Appledore & Bideford	270	313413	2	1152	26	56809	297	371374

Port or Landing	Demersal		Pelagic		Shellfish		Total	
	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value
Port Isaac	5	15761	0	0	182	376696	187	392457
Barnstaple & Ilfracombe	137	139505	1	764	47	49355	185	189624
TOTALS N & S COASTS	17912	33231547	12363	1977957	6759	8868371	37090	43.36m

Source: MAFF (Provisional only)

Table No. 2
UK Quotas 1991-92 with 1991 Uptake. Area VII

1991			1992	
Species and Sub Area	Quota (Tonnes)	Uptake**	Quota (Tonnes)	Quota change T.1991-92
Cod VIIa	3765	3944	3815	+50
Cod except VIIa+VIIi	1960	1640	1790	-170
Haddock VII+VIIi	600	573	600	-
Saithe VII+VIIi	2150	1883	2150	-
Whiting VIIa	4185	4386	4695	+510
Whiting VII except VIIa	2700	2378	2470	-230
Plaice VIIa	2370	1658	1895	-475
Plaice VIId and e	3110	2823	2790	-320
Plaice VIIf and g	450	387	350	-100
Plaice VIIh and j and k	435	282	510	+75
Sole VIIa	565	593	505	-60
Sole VIId	790	816	675	-115
Sole VIIe	470	473	470	-
Sole VIIf and g	215	234	215	-20
Sole VIIh and j and k	215	234	215	-
Mackerel (West UK)	197630	186782	230950	+33320*
Hake Vi+Vb+VIi	7150	6875	7140	-10
Herring IVc				
Ex. Blackwater+VIId	4230	4664	3980	-250
Herring VIIa	4440	2756	5180	+740
Herring VIIe and f	250	345	500	+250
Herring VIIg and k	20	0	30	+10
Anglers VII	6280	3634	6240	-40
Nephrops VII	6785	6802	6565	-220

* S.W. Mackerel Box Mobile Gear restrictions from Swanage to Fishguard remain in force
** Provisional catch returns, may be understated

Source: MAFF

Table No. 3
Cornish Fishing Fleet 1991 (Courtesy of C.S.F.C.)

Port	Fishing Method	Total No. of Boats	Registered Length in Feet	No. of Men Employed	Full or Part Time
Portwrinkle	Nets Nets/Pots	1 1	14 14-16	1 3	F* P
Downderry	Pots Nets	1 3	16 14	1 3	F* P
Looe	Otter Trawl Nets/Handlines Pots Handlines	28 11 3 18	32-50 21-35 21-38 21-36	58 16 4 36	F F F* P
Polperro	Otter Trawl Otter Trawl or Scallop Dredge Nets/Handlines	1 1 9	40 35 24-40	2 2 15	F P F*
Fowey	Scallop Dredge	6 14	25-45 18-25	18 18	F P
Polkerris	Pots/Nets	2	20	3	P
Charlestown	Pots Pots/Nets	1 2	25 18-20	2 2	F P
Mevagissey	Otter Nets Pots Nets/Pots/Handlines Nets/Pots/Handlines	6 30 1 10 20	32-44 16-50 33 20-25 16-25	14 60 3 12 20	F F* F F* P
Gorran Haven	Nets/Handlines	4	15	4	P
Portloe	Pots/Nets	6	18-20	7	P
Portscatho	Pots/Nets	2	20-25	4	P
St. Mawes	Scallop Dredge Nets Scallop Dredge or Trawl	3 2 2	30-35 25-30 40-50	6 3 6	F F* F
Flushing	Otter Trawl or Scallop Dredge Nets	2 4	40-50 20-30	6 6	F P
Mylor	Pots/Nets Pots/Nets	3 5	18-25 18-25	6 7	F P
Penryn	Nets Nets/Longlines Scallop Dredge	3 3 2	18-25 25-32 40-50	6 10 6	F F F
Falmouth	Scallop Dredge Otter Trawl Nets/Handlines Handlines	3 4 5 4	30-75 25-50 20-35 15-20	9 9 7 4	F F F* P
Helford	Nets Nets/Pots/Handlines Nets/Pots/Handlines	2 4 4	30-40 25-35 20-25	6 6 5	F F* P
Porthallow	Nets/Handlines	3	15-18	3	P
Porthoustock	Pots/Nets/Handling Trolling	15	14-18	18	P

Port	Fishing Method	Total No. of Boats	Registered Length in Feet	No. of Men Employed	Full or Part Time
Coverack	Pots/Nets	3	18-25	3	F*
	Pots/Nets	3	15-20	6	P
Cadgwith	Pots	6	18-25	11	F*
	Pots/Nets	3	18-25	4	P
Lizard Point	Pots/Nets	3	15-18	3	P
Mullion Cove	Pots	4	18-23	6	F*
	Pots	2	15-20	2	P
Porthleven	Pots	3	12-25	9	F*
	Pots/Nets/Handlines	2	15-20	4	F*
	Nets/Handlines	2	15-20	4	P
	Otter Trawl	1	30	2	F*
Prussia Cove	Pots/Nets/Handlines	2	15-22	3	P
St. Michael's Mount	Nets/Pots/Handlines	2	15	2	P
Penzance	Beam Trawl or Mid-Water Trawl	1	100	6	F
	Pots	1	25	1	F
	Nets/Pots	2	15-20	2	F* P
Newlyn	Beam Trawl	28	32-95	150	F
	Otter Trawl	35	32-70	100	F
	Seine Net	1	80	6	F
	Nets	40	15-60	140	F
	Longlines	2	30-70	8	F
	Pots	10	20-55	30	F*
	Nets/Handlines	20	14-25	25	P
Mousehole	Nets/Pots/Handlines	12	15-20	14	P
Lamorna Cove	Nets/Handlines	2	15	2	P
Penberth Cove	Pots/Handlines Trolling	12	15-18	14	F
	Pots/Handlines Trolling	3	15	3	P
Porthgwarra	Pots/Handlines Trolling	2	15	2	P
Sennen Cove	Pots/Nets/Handlines	7	12-20	10	F*
Cape Cornwall	Pots/Nets/Handlines	1	14	1	P
Portheras Cove Pendeen	Pots/Nets/Handlines	3	12-14	4	P
St. Ives	Nets	8	18-32	16	F*
	Nets/Handlines	40	12-20	50	P
Hayle	Pots	12	20-45	35	F*
	Nets	2	20-32	6	F*
	Trawl	1	45	2	F
	Nets/Pots	3	18-25	6	P
	Trawl	1	25	2	P
Portreath	Pots/Nets	4	18-25	8	F*
	Pots/Nets	4	18-25	6	P
St. Agnes	Pots/Nets	3	14-18	4	P

Port	Fishing Method	Total No. of Boats	Registered Length in Feet	No. of Men Employed	Full or Part Time
Newquay	Pots/Nets Pots/Nets	14 3	25-33 20-33	40 5	F* P
Padstow	Beam Trawl Otter Trawl Nets Nets/Pots Pots	2 3 6 2 12	65-70 40-50 30-60 25 20-45	10 8 16 4 25	F F F* F* F*
Portquin	Pots	1	16	2	P
Port Issac	Pots Pots/Nets	2 7	15-20 24-38	4 14	F* F*
Port Gaverne	Pots	1	15	2	P
Boscastle	Pots Pots/Nets	5 2	17-33 15	6 4	P P
Bude	Pots/Nets/Handlines Pots/Nets/Handlines	3 3	16-25 16-20	4 3	F* P

N.B.: Many fishing boats especially in the small ports and coves and usually under 25 ft in length are listed with F*. This is to indicate that they usually fish fulltime in the Spring to the beginning of Winter, and that during the Winter period either have very little or no activity. Therefore most of these fishermen have other forms of income for this period of the year.

The numbers of boats in the data are commercial fishing only and therefore do not include charter angling boats and hobby fishermen.

Table No. 4
Devon Fishing Fleet (Courtesy of D.S.F.C. and MAFF)

Port	Boats under 10m	Boats over 10m	Total Number of Boats
Axmouth	18		18
Beer	16		16
Sidmouth	12		12
Budleigh Salterton	10		10
Exmouth	38	9	47
Teignmouth	21	4	25
Torquay		3	3
Brixham	62	84	146
Kingswear		13	13
Dartmouth	39	2	41
Beesands	5		5
Salcombe	26	7	33
Hope Cove	7		7
Plymouth	40	41	81
Clovelly		1	1
Bideford	25	5	30
Appledore	16		16
Barnstaple	4		4
Braunton		1	1
Ilfracombe	12	5	17
Watermouth	5		5
Lynmouth	5		5

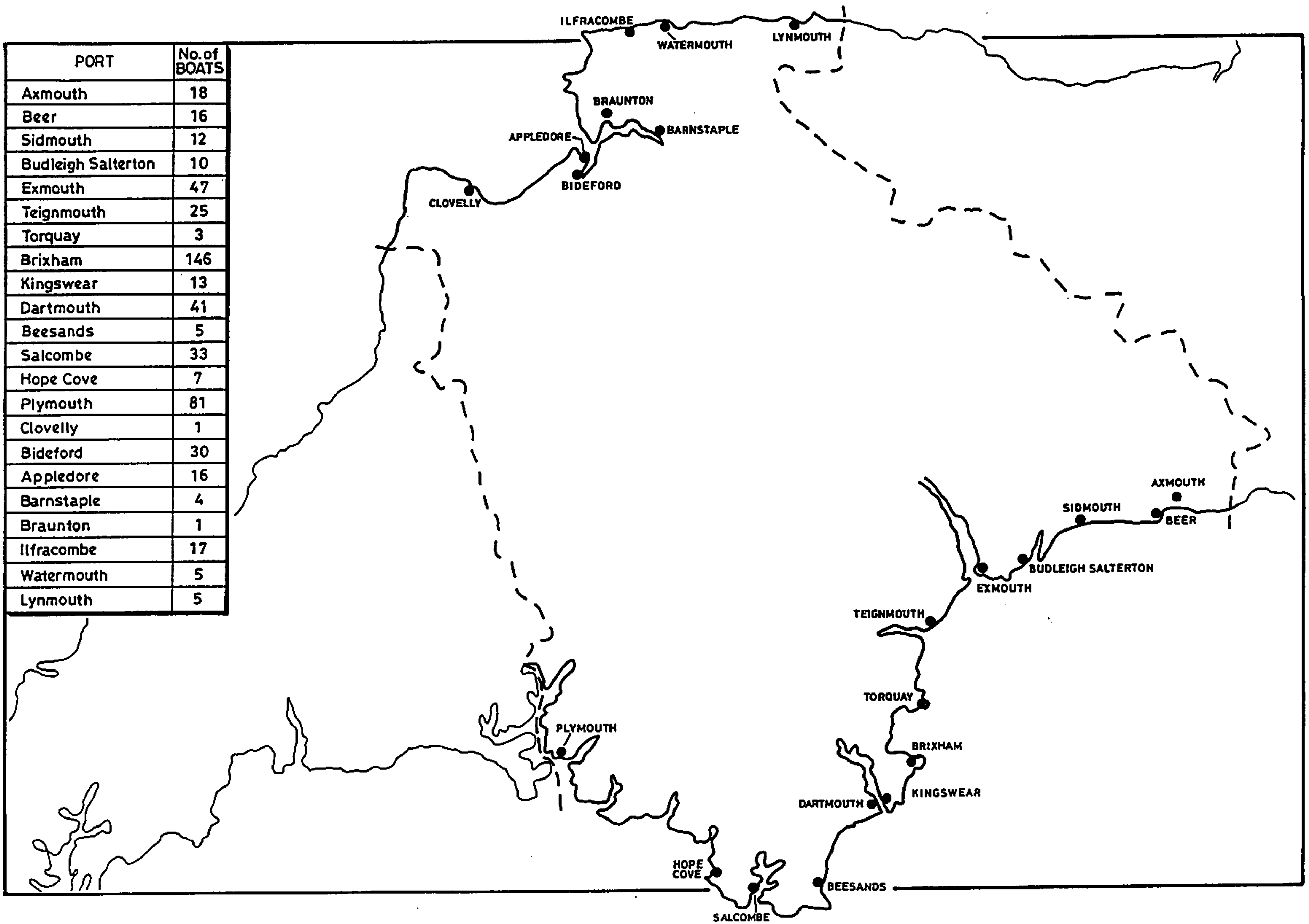
Table 5
Merchants, Processors and Traders

Name	Address	Agent	Merchant	Trader	Processor	Viver
Bluesail Fish Co	East Looe, Cornwall		✓		✓	
Looe Fish Ltd	East Looe, Cornwall		✓			
Looe Fishselling Ltd	East Looe, Cornwall	✓				
Ciamar (UK) Ltd	Falmouth, Cornwall		✓			
Duchy of Cornwall Oyster Farm	Falmouth, Cornwall		✓			
Falmouth Fishselling Co Ltd	Falmouth, Cornwall		✓			
Fowey Fish	Fowey, Cornwall		✓			
Hawkins Fish	Hale, Cornwall					✓
C B S Seafoods Ltd	Indian Queens, Cornwall		✓			✓
Dunwill Seafoods	Indian Queens, Cornwall		✓		✓	
Ocean Fish (Vistgate) Ltd	Mevagissey, Cornwall		✓			
Mr P Wills	Newquay, Cornwall				✓	
Cornwall Fishermen (1988) Ltd (Auctions)	Penzance, Cornwall	✓				
Mr M Dyer	Penzance, Cornwall				✓	
W Harvey & Sons	Penzance, Cornwall		✓		✓	✓
Nick Howell Ltd	Penzance, Cornwall		✓		✓	
B J Ridge	Penzance, Cornwall	✓				
W Stevenson & Sons	Penzance, Cornwall	✓	✓		✓	
Trelawney Fish	Penzance, Cornwall		✓			
J H Turner & Co	Penzance, Cornwall	✓	✓		✓	
Padstow Fisheries	Padstow, Cornwall		✓			
Trevose Seafoods Ltd	Padstow, Cornwall		✓			
Mr J C S Cabello	Saltash, Cornwall					✓
J. Earl	St. Agnes, Cornwall		✓		✓	✓
Ammodytes Co Ltd	St. Ives, Cornwall		✓		✓	
The Flying Fish	St. Austell, Cornwall		✓			
Mr D Treloar	St. Erth, Cornwall		✓			
Channel Foods Ltd	Truro, Cornwall				✓	
Wing of St. Mawes	Truro, Cornwall		✓		✓	
Beer Fisheries	Beer, Devon		✓			
Bideford Fish	Bideford East, N Devon		✓		✓	
Brixham Fish Marketing	Brixham, Devon		✓			
Brixham Trawler Agents	Brixham, Devon	✓				

Name	Address	Agent	Merchant	Trader	Processor	Viver
Mr J Coulson	Brixham, Devon		✓			
Fish Auctioneers (Brixham) Ltd	Brixham, Devon	✓				
Green Sea	Brixham, Devon		✓			
Kingfisher Ltd	Brixham, Devon		✓			
Mr D Langdon	Brixham, Devon					✓
Mainpass Ltd	Brixham, Devon		✓			
Shears Fish	Brixham, Devon		✓			
South West Fisheries	Brixham, Devon		✓			
River Exe Shellfish Farms	Exeter, Devon		✓			
Devon Sprats	Exmouth, Devon				✓	
East Devon Shellfish Ltd	Exmouth, Devon		✓			
Coombe Fisheries Ltd	Ilfracombe, N Devon				✓	
J Brannan Seafoods	Nr Kingsbridge, Devon					✓
Casmar Viviers	Kingsbridge, Devon					✓
Watt Fish	Kingsbridge, Devon		✓		✓	
A R D C Import-Export Ltd	Kingsteignton, Devon			✓		
Abbarrel Ltd	Newton Abbot, Devon				✓	
Brixham Seafare	Paignton, Devon		✓			
Brixspan	Paignton, Devon					✓
Browse Bros	Paignton, Devon				✓	
Mr M H Cornish	Paignton, Devon		✓			
Ekers Shellfish UK	Paignton, Devon					✓
Airmar	Plymouth, Devon					✓
Donnan, S & R Seafoods Ltd	Plymouth, Devon		✓			
R Down	Plymouth, Devon		✓			
Interfish Ltd	Plymouth, Devon		✓			
S & J Auctions Ltd	Plymouth, Devon	✓	✓			
Turner, Percy & Sons Ltd	Plymouth, Devon	✓	✓			
A Underwood Shellfish	Plymouth, Devon				✓	
Salcombe Sea larder	Salcombe, Devon		✓			
Dilon Seafoods	South Brent, Devon				✓	
Sea Jay	Totnes, Devon		✓			
Devon Oyster Seafoods Ltd	Totnes, Devon		✓			

Name	Address	Agent	Merchant	Trader	Processor	Viver
Offshore Farms	Totnes, Devon		✓			
D R W Foods	Yelverton, Devon					
Foster & Finch	Plymouth, Devon		✓			
Bahia Seafoods	Exeter, Devon		✓			
Sea view Crab	St. Merryn, Cornwall				✓	

PORT	No. of BOATS
Axmouth	18
Beer	16
Sidmouth	12
Budleigh Salterton	10
Exmouth	47
Teignmouth	25
Torquay	3
Brixham	146
Kingswear	13
Dartmouth	41
Beesands	5
Salcombe	33
Hope Cove	7
Plymouth	81
Clovelly	1
Bideford	30
Appledore	16
Barnstaple	4
Braunton	1
Ilfracombe	17
Watermouth	5
Lynmouth	5

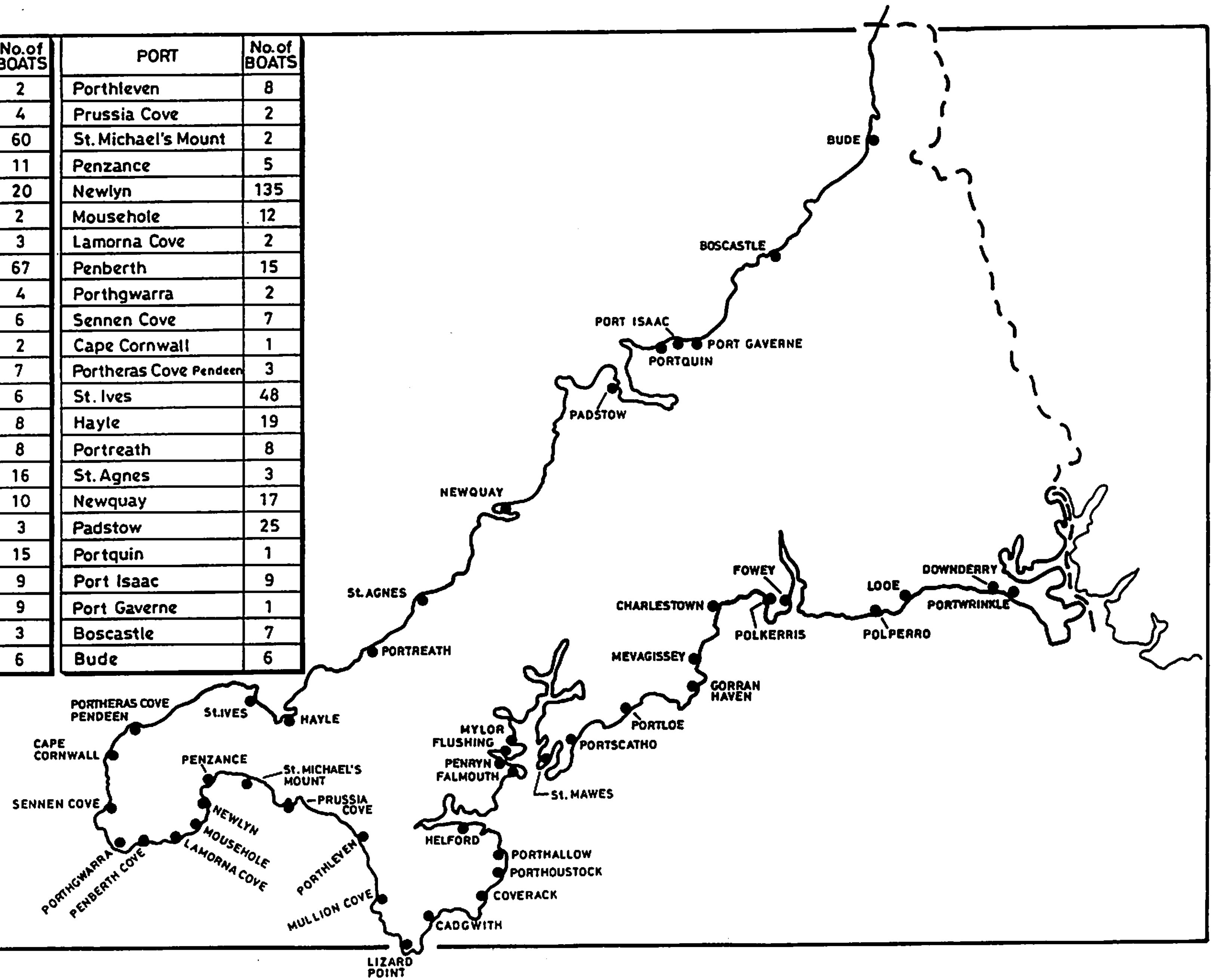


Devon Fishing Fleet (courtesy of D.S.F.C. and MAFF)

Fig. 1

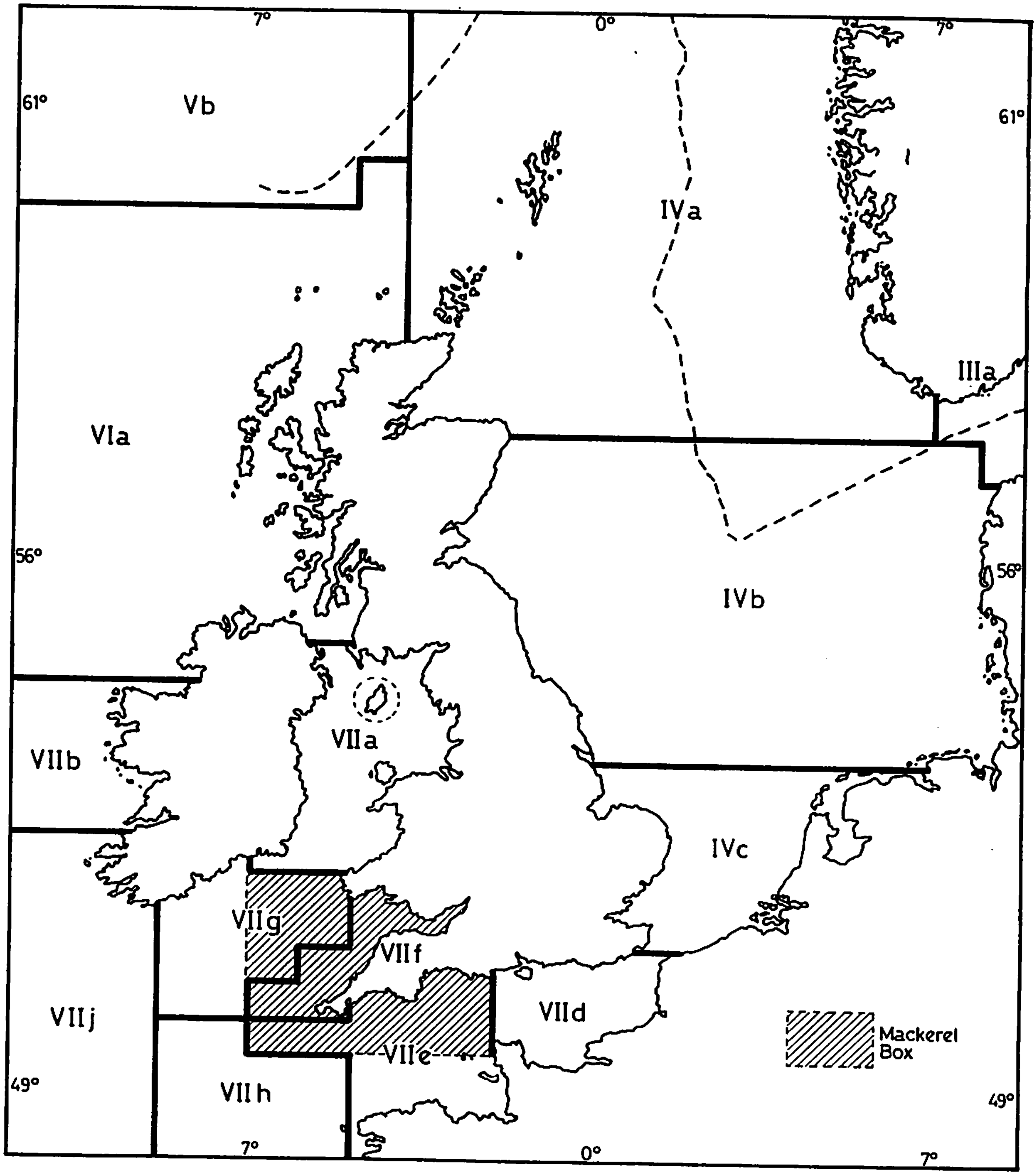
PORT	No. of BOATS
Portwrinkle	2
Downderry	4
Looe	60
Polperro	11
Fowey	20
Polkerris	2
Charlestown	3
Mevagissey	67
Gorran Haven	4
Portloe	6
Porthscatho	2
St. Mawes	7
Flushing	6
Mylor	8
Penryn	8
Falmouth	16
Helford	10
Porthallow	3
Porthoustock	15
Coverack	9
Cadgwith	9
Lizard Point	3
Mullion Cove	6

PORT	No. of BOATS
Porthleven	8
Prussia Cove	2
St. Michael's Mount	2
Penzance	5
Newlyn	135
Mousehole	12
Lamorna Cove	2
Penberth	15
Porthgwarra	2
Sennen Cove	7
Cape Cornwall	1
Portheras Cove Pendeen	3
St. Ives	48
Hayle	19
Portreath	8
St. Agnes	3
Newquay	17
Padstow	25
Portquin	1
Port Isaac	9
Port Gaverne	1
Boscastle	7
Bude	6



Cornish Fishing Fleet 1991 (courtesy of C.S.F.C.)

Fig. 2



ICES Fishing Areas

Fig. 3

Figure 4 - Total Weight of Landings into Newlyn in 1989 by ICES rectangles

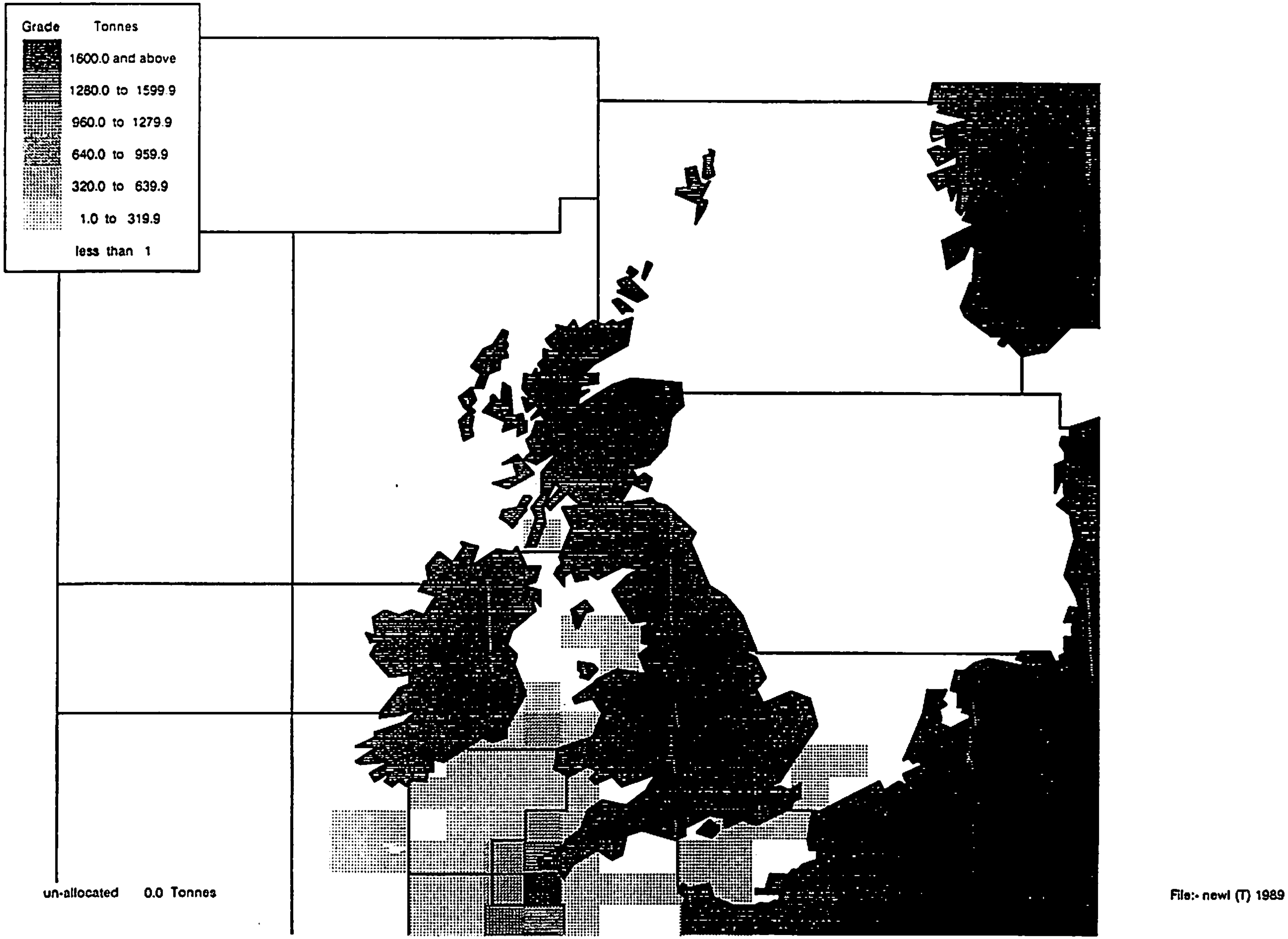


Figure 5 - Total Value of Landings into Newlyn in 1989 by ICES rectangles

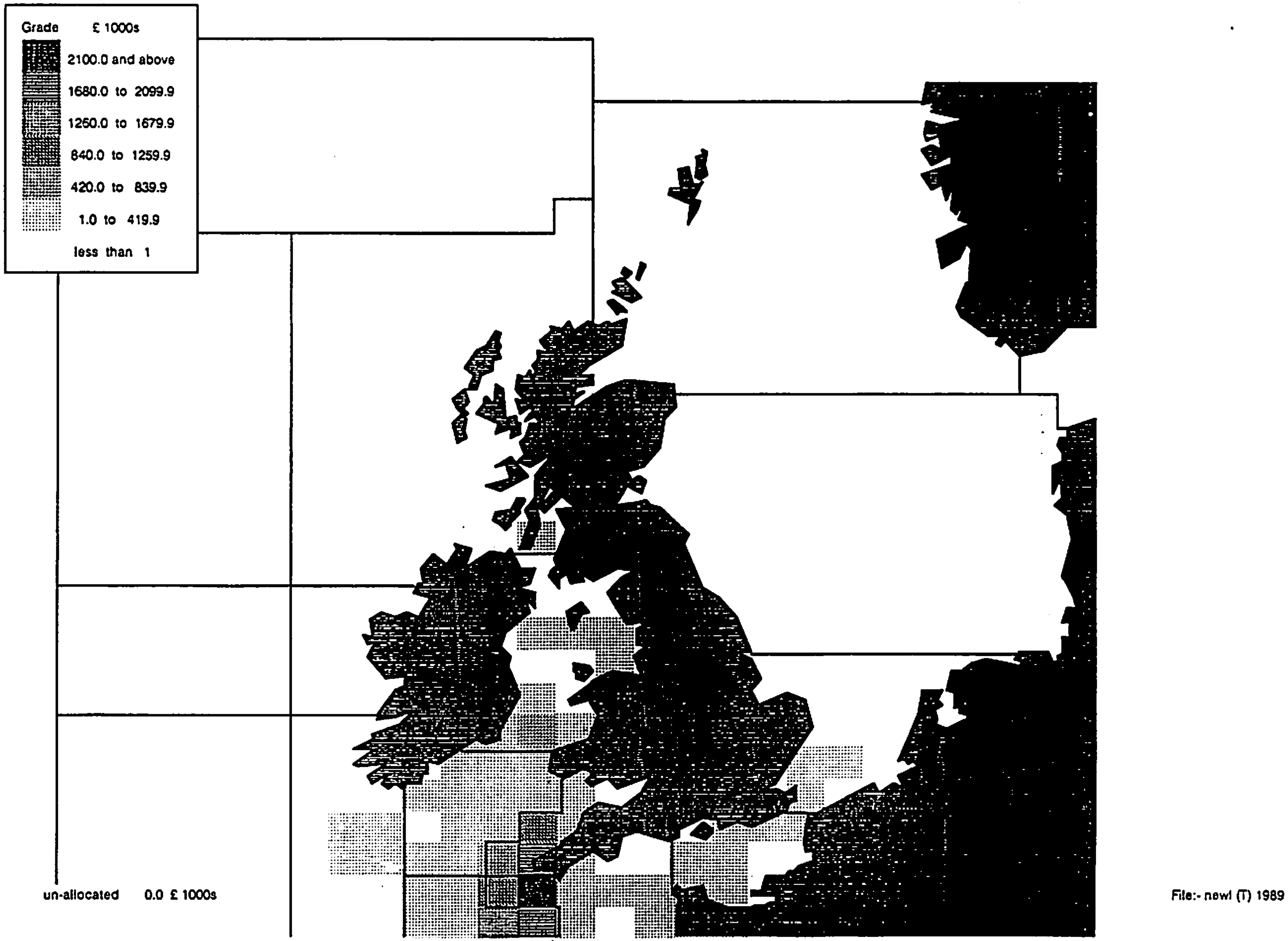


Figure 6 - Total Weight of Landings into Plymouth in 1989 by ICES rectangles

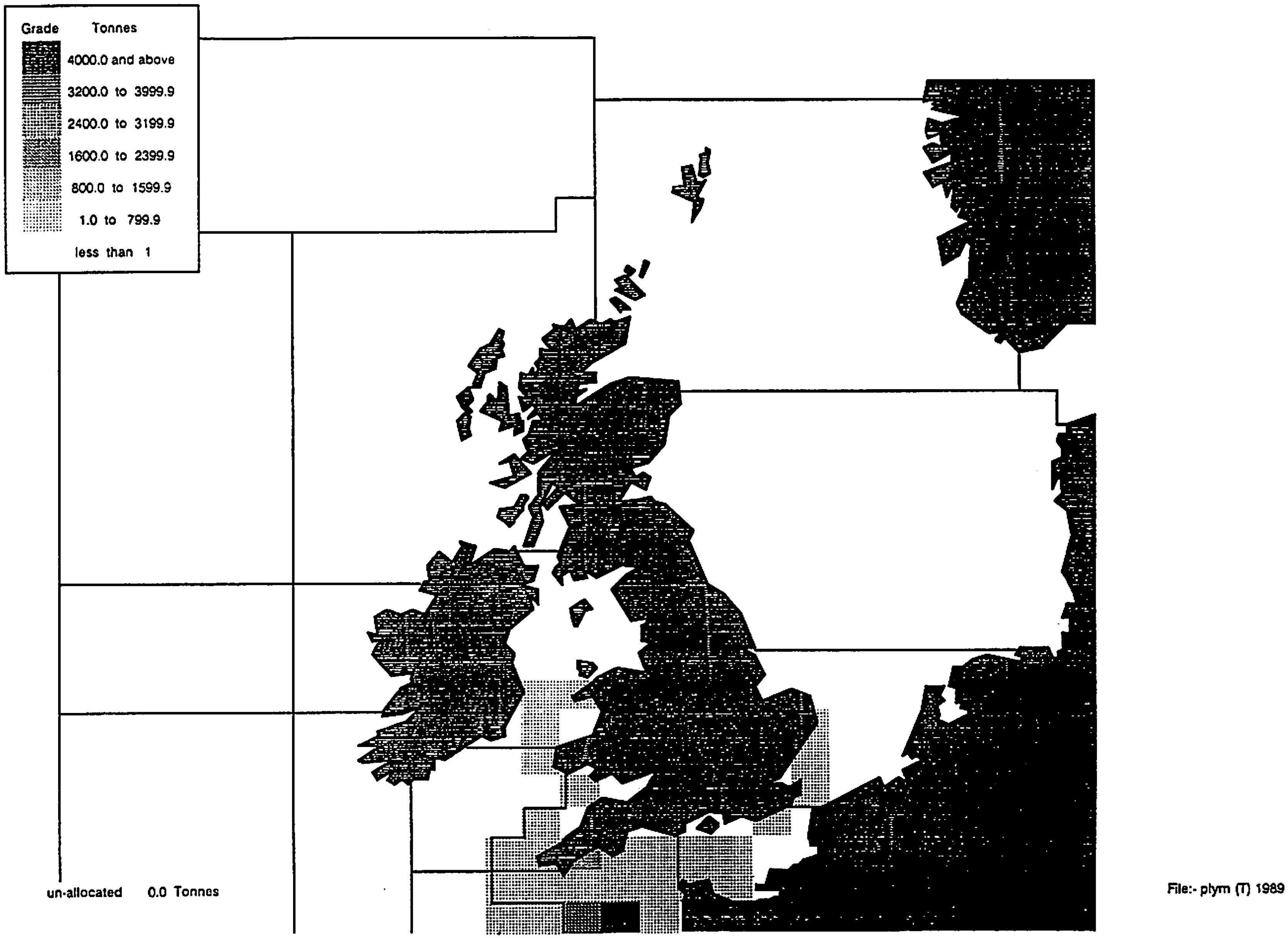


Figure 7 - Total Value of Landings into Plymouth in 1989 by ICES rectangles

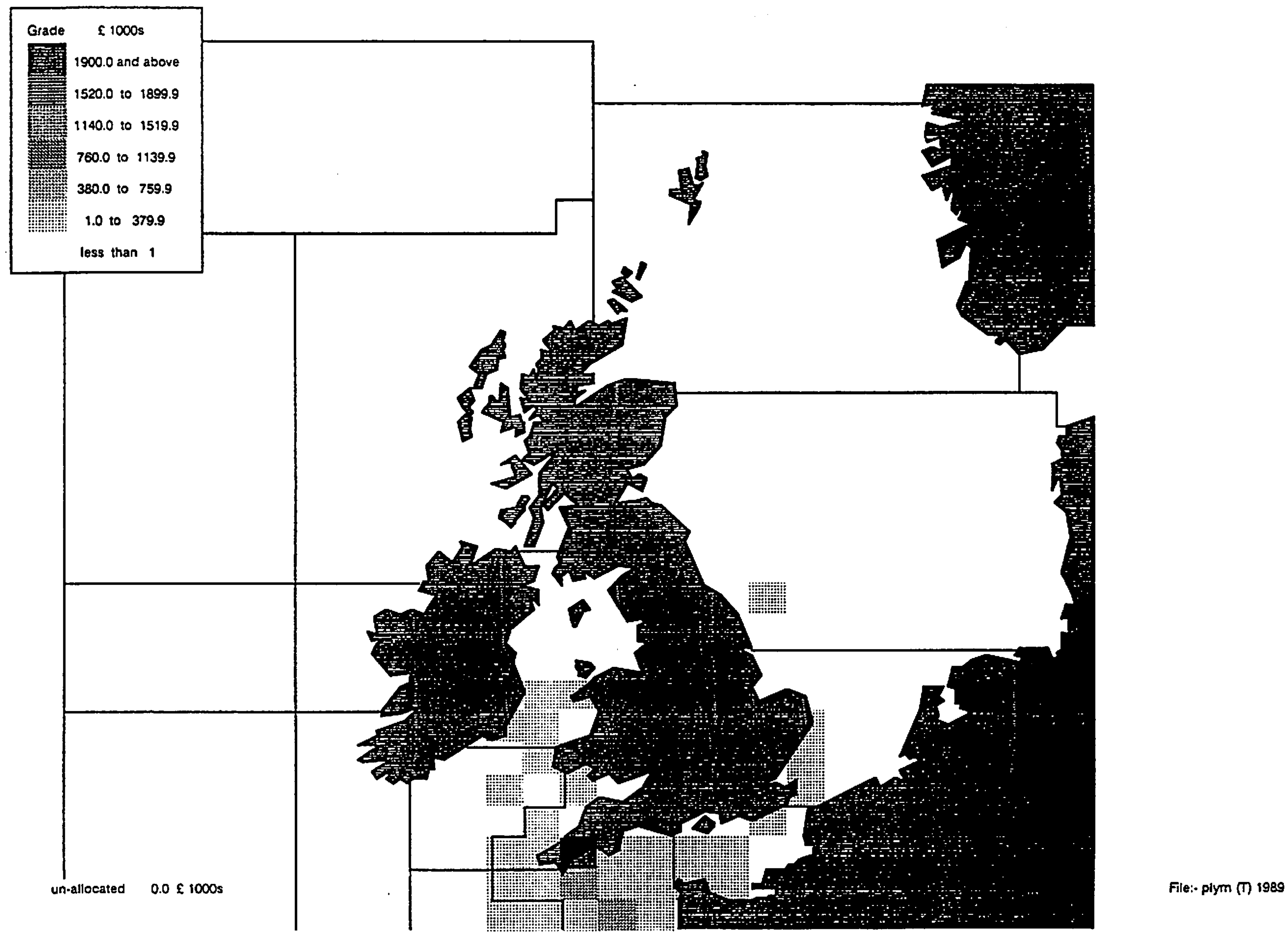


Figure 8 - Total Weight of Landings into Brixham in 1989 by ICES rectangles

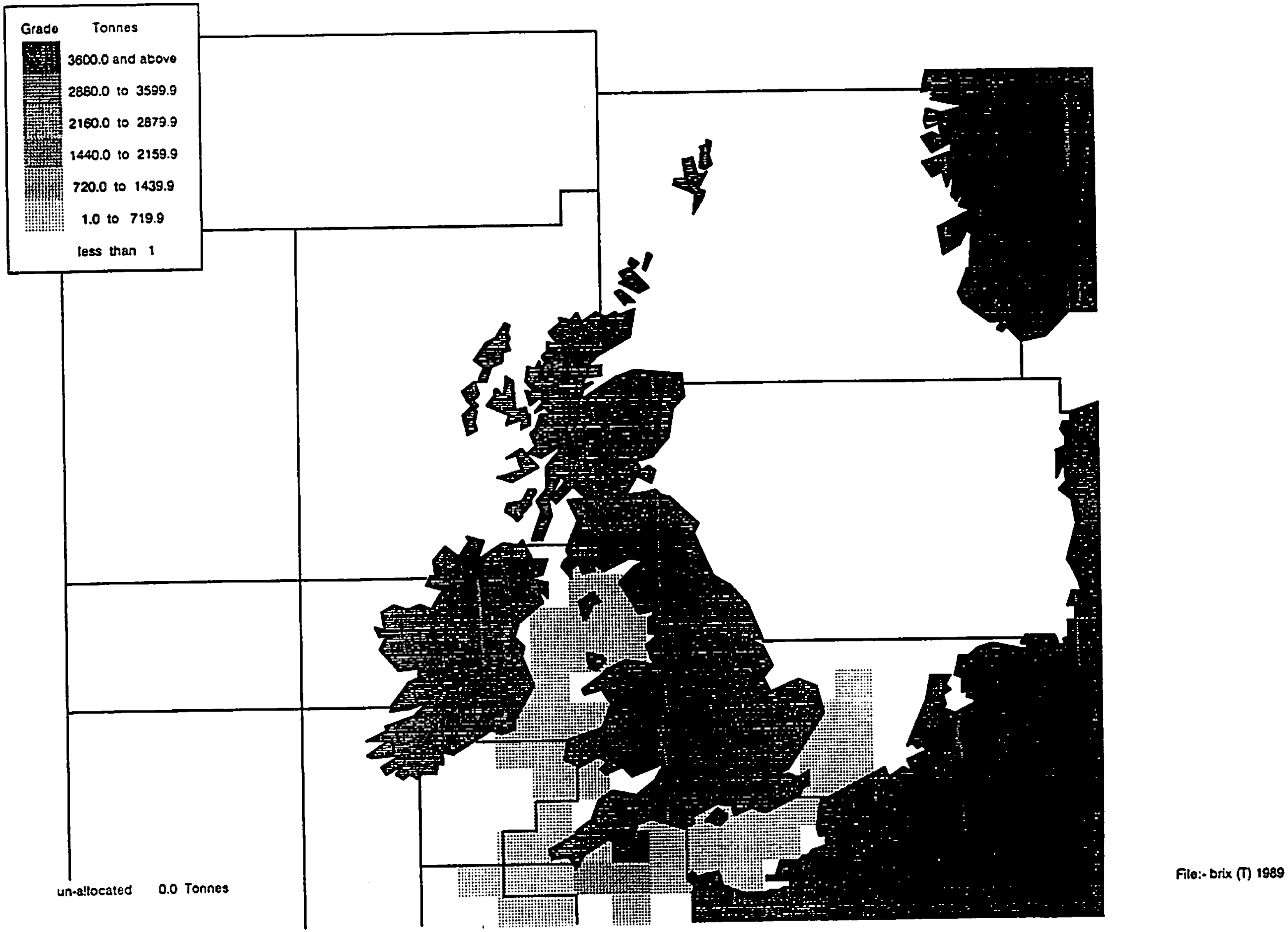


Figure 9 - Total Value of Landings into Brixham in 1989 by ICES rectangles